

SHOOK™ RESEARCH

2019 Forbes/SHOOK On The Road — Teams Event

InterContinental, LA - Century City

CE Credits are available for all sessions

Tuesday,
June 11th, 2019

TIME	SESSION & SPEAKER
1:15 - 1:25 pm	Welcome Remarks <ul style="list-style-type: none"> • R.J. SHOOK - Founder, SHOOK Research & Forbes Contributor
1:25 - 1:30 pm	SHOOK "Talks" (CFP,I-W) <ul style="list-style-type: none"> • Shirley Quackenbush - Managing Director, Private Wealth Advisor, Merrill Private Wealth Management • Introduction: Nick Cirbo - Vice President, Senior Advisor Consultant, Invesco
1:30 - 1:55 pm	Is Value Investing Dead...or Just Sleeping? (CFP,I-W) <ul style="list-style-type: none"> • Adam Barth - Director of Research, Gotham Asset Management • Introduction: Pat Dwyer - Managing Director, Merrill Private Wealth Management
1:55 - 2:15 pm	Top Advisor Panel: Creating a Winning Team Culture (CFP,I-W) <ul style="list-style-type: none"> • Reza Zafari - Managing Director, Merrill Private Wealth Management • Randy Conner - President, Churchill Management Group • Moderator & Introduction: Robert Milliman - Western Divisional Sales Manager, First Eagle Investment Management
2:15 - 2:40 pm	Conversation with Jeffrey Gundlach: Market Risks, Opportunities, and More (CFP,I-W) <ul style="list-style-type: none"> • Jeffrey Gundlach - CEO & CIO, DoubleLine
2:40 - 2:55 pm	Marketing Your Team's Forbes Recognition (CFP,I-W) <ul style="list-style-type: none"> • Pat Dwyer - Managing Director, Merrill Private Wealth Management • Craig Macomber - Partner / Private Wealth Manager, Stratos Wealth Partners • Moderator: Frank Berland - Managing Director, SHOOK Research • Introduction: Tom Monks - Regional Vice President / Advisor Consultant, Hartford Funds
2:55 - 3:10 pm	Break
3:10 - 3:40 pm	Concurrent Breakout Sessions <ul style="list-style-type: none"> Tax-aware Strategies for the California Market, Salon IV (CFP,I-W) <ul style="list-style-type: none"> • Bruce Munster - Managing Director, Merrill Private Wealth Management • Moderator: Lisa Charkoudian & Lauren Godlasky, Gotham Asset Management Team Structures and Efficiencies, Ballroom (CFP,I-W) <ul style="list-style-type: none"> • Renee Fourcade - UBS Financial Services • Ronald Munman - Executive Director, J.P. Morgan Securities • Moderator: David Borrelli - Senior Vice President & National Sales Manager, Invesco
3:40 - 3:50 pm	Transition to Next Breakout

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3:50 - 4:20 pm

Concurrent Breakout Sessions

What is the Right Team Structure to Serve the Affluent, *Ballroom (CFP,I-W)*

- **Stephen Davis** - Managing Director, UBS Financial Services
- **Brandi Schnathorst** - Account Vice President, UBS Financial Services
- **James Klein** - Managing Director, Morgan Stanley Private Wealth Management
- **Moderator: Michael Lane** - Head of US Wealth Advisory, iShares, BlackRock

Intergenerational Teams, How to Structure, Market, and Serve Clients, *Salon IV (CFP,I-W)*

- **Joseph Schirripa** - Managing Director, UBS Financial Services
- **Nicolas Schirripa** - Vice President, UBS Financial Services
- **John Shadden** - Managing Director / Private Wealth Advisor,
Morgan Stanley Private Wealth Management
- **Moderator: Bill McManus** - Managing Director / Strategic Markets, Hartford Funds

4:20 - 4:35 pm

Break

4:35 - 5:00 pm

Outlook on the Markets & What's Ahead *(CFP,I-W)*

- **Bob Doll**, Chief Equity Strategist, Nuveen

5:00 - 5:05 pm

SHOOK "Talks" *(CFP,I-W)*

- **Rick Blosser** - Wells Fargo Advisors
- **Introduction: Jamie DeNitto** - Managing Director, Chiron Investment Management

5:05 - 5:15 pm

A Long Term Catalyst for Chinese Equities *(CFP,I-W)*

- **Brendan Ahern**, Chief Investment Officer, KraneShares
- **Introduction: Bill Fagan** - Director, KraneShares

5:15 - 5:20 pm

SHOOK "Talks" *(CFP,I-W)*

- **Amir Mossanen** - Suntrust
- **Introduction: Mason Billock** - RIA & Private Bank Advisor Consultant,
New York Life Investments

5:20 - 5:40 pm

Top Advisor Panel: The Future of Teams *(CFP,I-W)*

- **Rebecca Rothstein** - Managing Director, Merrill Private Wealth Management
- **Mark Binder** - UBS Financial Services
- **Moderator & Introduction: Michael Schweitzer**, Capital Group / American Funds

5:40 - 5:45 pm

Closing Remarks

- **R.J. Shook**, Founder, SHOOK Research & Forbes Contributor

5:45 - 6:15 pm

Cocktail Reception